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# BUSINESS IN NEBRASKA

Prepared by the Bureau of Business Research, 200 College of Business Administration, University of Nebraska, Lincoln, NE 68588-0406, 402/472-2334

## CHANGING PATTERNS OF NEBRASKA BUSINESS ESTABLISHMENTS 1979-1983

The number of Nebraska business establishments has expanded in recent years. In 1979 there were an estimated 37,959 business establishments, compared with 41,889 in 1983. The number of business establishments declined in the 1980-1982 recession, but now appears to have surpassed previous numbers. Caution is advised in interpretation of the data, since a change in definitions makes 1983 establishment data not strictly comparable with previous years. This growth is reviewed in greater detail below.

The Nebraska economy peaked in 1980-1981. The metropolitan segment of Nebraska continued to expand, but growth came to a halt in 1982 as the national recession impacted the metropolitan portions of Nebraska's economy. The nonmetropolitan portions of Nebraska's economy seem to have peaked earlier, in about 1979. Several construction projects in rural Nebraska ended in the late 1970s, and sagging grain and livestock prices continued to depress the rural Nebraska economy. The payment-in-kind (PIK) program disguised some of the problems in the rural economy. When the PIK program ended, the depressed state of agriculture was apparent. Rising real interest rates and a prolonged reduction in per capita beef consumption forced many plains states packing plants out of business.

This article examines the number of Nebraska business establishments from 1979 through 1983, the most recent year for which data are available. The data on establishments were taken from *County Business Patterns*, a publication of the U.S. Department of Commerce, Bureau of the Census. An establishment is defined as a physical location where business is conducted or where services or industrial operations are performed.

The survey is conducted in mid March of each year from the Treasury's form 941. Data are reported by county. Definitional changes in 1983 make strict comparisons impossible. An establishment is included in the 1983 totals if it were active any time during calendar year 1983. For establishment data prior to 1983, an establishment had to be in operation during the surveyed period to be included. Using 1982 would avoid the definitional issues, but it would result in comparing a year of peak economic intensity (1979) with a year of depressed economy activity (1982). All states are affected equally by this change and all areas within a state are impacted equally. Caution is advised, however, in interpreting these data.

### GENERAL TRENDS

The number of business establishments in Nebraska, according to *County Business Patterns*, increased from 37,959 in 1979 to 41,889 in 1983, a gain of 10.4 percent. Growth in the number of establishments was more rapid in the metro areas. Nebraska metro counties include: Douglas, Sarpy, Washington, Lancaster, and Dakota. The number of establishments rose from 15,687 in 1979 to 17,917 in 1983, an increase of 14.2 percent. Sarpy County had the largest percentage increase of all counties (23.6%), followed by Douglas (14.2%), Lancaster (12.6%), Washington (12.3%), and Dakota (11.7%).

Over the period 1979-1982, the interval when there were no definitional changes, the number of establishments in Nebraska declined by less than 500 (Table 1). Once again, the pattern of a small decline (larger increase) in the metropolitan part of the state was evident.

TABLE 1
Nebraska Business Establishments

| Total | Establishments | Employees | Payroll ($ thousands) |
|---|---|---|---|
| 1983 | 41,889 | 466,920 | $6,938,309 |
| 1982 | 37,500 | 474,827 | 6,586,906 |
| 1981 | 37,582 | 481,704 | 6,313,644 |
| 1980 | 37,727 | 492,010 | 5,956,980 |
| 1979 | 37,959 | 485,332 | 5,341,005 |

Source: All tables are derived from *County Business Patterns* and from calculations by the Bureau of Business Research

While the number of business establishments is up in the state, the number of employees in these establishments has decreased steadily. In 1979 there were an estimated 485,332 employees, compared with 466,900 in 1983. This does not mean that total employment in the state has declined, because a number of inportant industries are not included in the survey. It does, however, indicate that many employers have consistently reduced the number of employees while sales have expanded. Firms have become "leaner and meaner" and, it is to be hoped, more productive and efficient. This trend toward fewer employees is occurring nationally.

In 1979, 58.0 percent of all employees in the survey were in the metro area, compared with 59.4 percent in 1983. The number of employees in metro establishments declined about 4,000, compared with the decline statewide of 14,000. In other words, there was a disproportionate number of positions eliminated in the nonmetropolitan area of the state's economy.

(continued on page 2)

TABLE 2

Number of Establishments

Nebraska Metro Counties, Counties with Larger Towns

| | 1983 | 1982 | 1979 | Percent Change 1979-1983 | Percent Change 1979-1982 | Percent Change 1982-1983 |
|---|---|---|---|---|---|---|
| Nebraska Total | 41,889 | 37,500 | 37,959 | 10.35 | -1.21 | 11.70 |
| Metro Counties | | | | | | |
| Douglas | 11,129 | 9,839 | 9,746 | 14.19 | 0.95 | 13.11 |
| Sarpy | 1,109 | 920 | 897 | 23.63 | 2.56 | 20.54 |
| Washington | 402 | 353 | 358 | 12.29 | -1.40 | 13.88 |
| Lancaster | 4,930 | 4,400 | 4,378 | 12.61 | 0.50 | 12.05 |
| Dakota | 347 | 310 | 308 | 12.66 | 0.65 | 11.94 |
| Metro Total | 59,806 | 53,322 | 53,646 | 11.48 | -0.60 | 12.16 |
| Nonmetro Total | 23,972 | 21,678 | 22,272 | 7.60 | -2.70 | 10.60 |
| Counties with Larger Communities | | | | | | |
| Lincoln | 964 | 855 | 899 | 7.23 | -4.89 | 12.75 |
| Hall | 1,577 | 1,422 | 1,462 | 7.87 | -2.74 | 10.90 |
| Adams | 915 | 837 | 835 | 9.58 | 0.24 | 9.32 |
| Buffalo | 1,115 | 979 | 977 | 14.12 | 0.20 | 13.89 |
| Box Butte | 352 | 322 | 328 | 7.32 | -1.83 | 9.32 |
| Scotts Bluff | 1,200 | 1,080 | 1,106 | 8.50 | -2.35 | 11.11 |
| Madison | 1,035 | 932 | 988 | 4.76 | -5.67 | 11.05 |
| Keith | 360 | 304 | 301 | 19.60 | 1.00 | 18.42 |
| Dawes | 268 | 253 | 250 | 7.20 | 1.20 | 5.93 |
| Dawson | 680 | 617 | 621 | 9.50 | -0.64 | 10.21 |
| Red Willow | 472 | 436 | 430 | 9.77 | 0.01 | 0.08 |
| Subtotal | 8,938 | 8,037 | 8,197 | 9.04 | -1.95 | 11.21 |

Source: see Table 1.

(continued from page 1)

While the number of employees has declined over the interval 1979-1983, payrolls have increased. Total Nebraska payrolls were $5.3 billion in 1979, compared with $6.9 billion in 1983. Metropolitan area payrolls soared dramatically over this interval. Sarpy County payrolls rose from $72.2 million in 1979 to $127.1 million in 1983, an increase of 76.0 percent. Douglas County payrolls increased from $2.4 billion to $3.25 billion, a gain of 36.5 percent. Lancaster County payrolls increased from $777.7 million to $1,038.1 million, a jump of 33.5 percent over the same interval. Dakota County payrolls increased 38.1 percent.

By contrast, nonmetropolitan payrolls grew from $2 billion to $2.358 billion in 1983, an increase of 18.7 percent. Once again, the dichotomy in Nebraska's economy is apparent (Chart 1).

## ANALYSIS OF SURROUNDING STATES

Data in Table 3 set out the change in the number of establishments, employees, and payroll over the interval 1979-1983 for Nebraska and all bordering states. Information is provided for the state total and for a breakdown of the metropolitan and nonmetropolitan regions of each state. Metropolitan and nonmetropolitan definitions follow the conventional Department of Commerce designations, so consistency is achieved across states.

Colorado led all states in terms of establishment growth over the interval 1979-1983. Not surprisingly, Colorado also led in terms of employees and payroll over this same interval. Metropolitan and nonmetropolitan growth in Colorado have been

(continued on page 3)

TABLE 3
Percentage Change
In Establishments, Employees, and Payrolls
1979-1983

| | Establishments | Employees | Payroll |
|---|---|---|---|
| Nebraska | | | |
| Total | 10.4 | -3.8 | 29.9 |
| Metro | 14.2 | -1.5 | 36.5 |
| Nonmetro | 7.6 | -7.0 | 18.7 |
| Iowa | | | |
| Total | 6.8 | -12.2 | 12.2 |
| Metro | 10.7 | -11.4 | 12.6 |
| Nonmetro | 4.3 | -13.1 | 11.7 |
| South Dakota | | | |
| Total | 9.2 | -6.1 | 25.5 |
| Metro | 12.4 | 1.4 | 34.2 |
| Nonmetro | 8.5 | -9.0 | 21.1 |
| Kansas | | | |
| Total | 13.5 | -5.7 | 29.1 |
| Metro | 17.8 | -5.4 | 30.2 |
| Nonmetro | 10.0 | -6.1 | 27.1 |
| Missouri | | | |
| Total | 12.1 | -5.8 | 28.7 |
| Metro | 16.2 | -1.7 | 35.1 |
| Nonmetro | 6.8 | -12.4 | 17.1 |
| Wyoming | | | |
| Total | 22.0 | -4.9 | 24.3 |
| Metro | 14.4 | -14.4 | 7.2 |
| Nonmetro | 23.8 | -2.5 | 29.0 |
| Colorado | | | |
| Total | 26.7 | 7.6 | 54.3 |
| Metro | 31.9 | 13.0 | 63.8 |
| Nonmetro | 20.7 | 1.9 | 44.5 |

(continued from page 2)
greater than in most states of this region. Wyoming, in many cases, is a close second.

A net increase in businesses was more likely to be established in a metropolitan area than in a nonmetropolitan area. In each case, the metro growth rate was greater than the nonmetro growth rate. Likewise, employees were more likely to find employment opportunities more numerous in the metropolitan areas than in the nonmetropolitan areas in Nebraska and all surrounding states. Colorado recorded an increase in employees and South Dakota registered a gain at the metropolitan level, probably because of the establishment of Citicorps facilities in Sioux Falls. Payrolls rose more substantially in Colorado than in other states.

Ranking the states reveals some interesting trends. Colorado ranked first in all categories. Nebraska ranked second in terms of employment growth and payroll growth, although establishment growth ranked fifth during the interval 1979-1983. Nebraska's metropolitan areas ranked second only behind Colorado in terms of the change in the number of employees and payroll increases. It should be noted that Colorado was the only state to record a gain in the number of employees over the period 1979-1983. Nebraska registered a 3.8 percent decrease in employees, which was the second best among Nebraska and surrounding states. Nebraska's payroll climbed 29.9 percent over the interval 1979-1983, second only to Colorado's 54.3 percent jump.

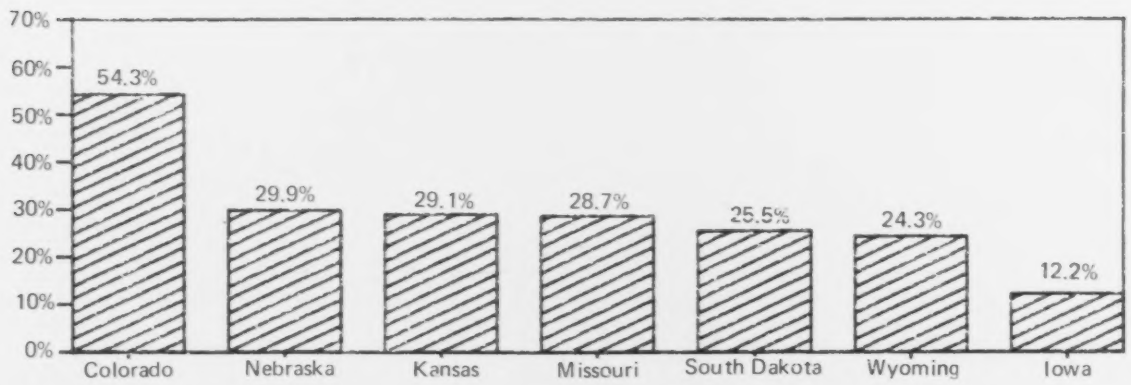
DONALD E. PURSELL

TABLE 4
Ranking of Nebraska Compared to Surrounding States

| | Establishments | Employees | Payroll |
|---|---|---|---|
| State | 5 | 2 | 2 |
| Metro | 5 | 2 | 2 |
| Nonmetro | 4 | 4 | 4 |

Source: see Table 1.

CHART 1
Percentage Change in Payrolls 1979-1983 in Nebraska and Surrounding States



## Review and Outlook

Declines in real output for both the agriculture and nonagriculture components of Nebraska's economy led to a September 1985 drop in the Bureau of Business Research's physical volume index. On a month-to-month basis, state economic activity fell 0.8 percent during September. Agriculture output decreased 3.6 percent, while nonagriculture activity was down 0.2 percent.

The level of manufacturing activity continued to seesaw with September output declining 1.2 percent, after increasing 1.4 percent during the previous month. September construction output fell 2.3 percent, the fourth monthly drop in economic activity for this component. Output for the distributive sector remained flat in September, while the government component registered an increase in economic activity of 0.9 percent.

The Bureau of Business Research is receiving current data on cash farm marketings again from the U.S. Department of Agriculture. On a seasonally adjusted basis, Nebraska cash farm marketings increased $45 million during September 1985. State cash receipts were up $153 million from the September 1984 level, a gain of 45 percent. After months of steady decline, Nebraska's index of agriculture prices received rose during September. Ag prices received were up 1.4 percent from the level of the previous month, but down 15 percent from the September 1984 index.

(continued on page 5)

Notes for Tables 1 and 2: (1) The "distributive" indicator represents a composite of wholesale and retail trade; transportation, communication and utilities; finance, insurance, and real estate; and selected services. (2) The "physical volume" indicator and its components represent the dollar volume indicator and its components adjusted for price changes using appropriate price indexes–see Table 5, page 5.

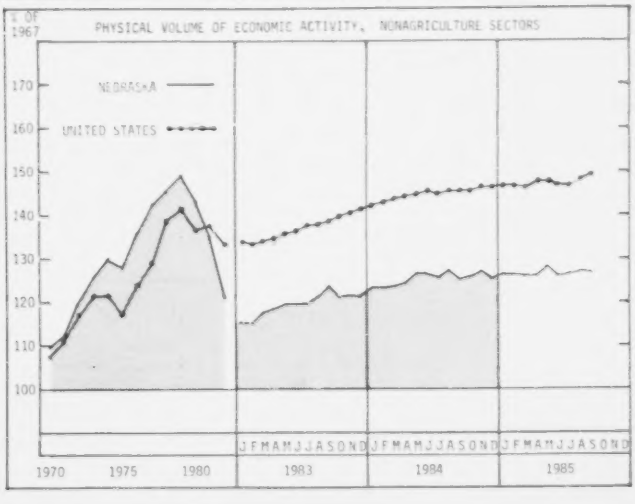
### ECONOMIC INDICATORS: NEBRASKA AND UNITED STATES

1. CHANGE FROM PREVIOUS YEAR

| September 1985 | Current Month as Percent of Same Month Previous Year | | 1985 to date as percent of 1984 to date | |
|---|---|---|---|---|
| Indicator | Nebraska | U.S. | Nebraska | U.S. |
| Dollar Volume | 107.9 | 106.3 | 104.7 | 105.7 |
| Agricultural | 136.4 | 106.9 | 103.5 | 98.8 |
| Nonagricultural | 104.5 | 106.3 | 104.9 | 105.9 |
| Construction | 91.6 | 107.8 | 94.3 | 109.4 |
| Manufacturing | 98.5 | 99.0 | 100.0 | 100.4 |
| Distributive | 105.8 | 108.7 | 105.5 | 107.5 |
| Government | 111.2 | 106.8 | 113.2 | 106.8 |
| Physical Volume | 108.8 | 103.7 | 103.8 | 102.9 |
| Agricultural | 160.4 | 123.1 | 117.1 | 110.6 |
| Nonagricultural | 101.6 | 103.2 | 101.5 | 102.6 |
| Construction | 89.6 | 105.4 | 91.7 | 106.3 |
| Manufacturing | 99.6 | 99.0 | 100.4 | 100.0 |
| Distributive | 102.6 | 105.3 | 101.8 | 103.8 |
| Government | 103.9 | 101.7 | 104.6 | 101.7 |

2. CHANGE FROM 1967

| | Percent of 1967 Average | |
|---|---|---|
| Indicator | Nebraska | U.S. |
| Dollar Volume | 382.5 | 452.9 |
| Agricultural | 385.4 | 331.0 |
| Nonagricultural | 381.9 | 456.8 |
| Construction | 273.9 | 460.8 |
| Manufacturing | 360.0 | 317.6 |
| Distributive | 391.7 | 532.5 |
| Government | 432.5 | 463.4 |
| Physical Volume | 134.5 | 149.5 |
| Agricultural | 183.5 | 151.2 |
| Nonagricultural | 127.0 | 149.4 |
| Construction | 76.7 | 129.1 |
| Manufacturing | 146.7 | 125.3 |
| Distributive | 120.7 | 164.1 |
| Government | 153.7 | 152.2 |

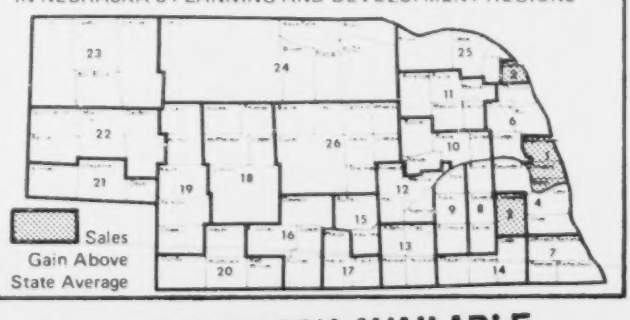



### 3. NET TAXABLE RETAIL SALES OF NEBRASKA REGIONS AND CITIES

| Region Number[1] and City | City Sales[2] Sept. 1985 as percent of Sept. 1984 | Sales in Region[2] Sept. 1985 as percent of Sept. 1984 | Sales in Region[2] 1985 to date as percent of 1984 to date |
|---|---|---|---|
| *The State* | 97.5 | 100.1 | 99.6 |
| 1 Omaha | 103.5 | 105.7 | 105.3 |
| Bellevue | 99.5 | | |
| Blair | 106.9 | | |
| 2 Lincoln | 101.4 | 105.9 | 103.8 |
| 3 So. Sioux City | 102.4 | 103.5 | 100.6 |
| 4 Nebraska City | 98.1 | 104.0 | 96.2 |
| 6 Fremont | 96.7 | 95.8 | 95.4 |
| West Point | 101.0 | | |
| 7 Falls City | 95.1 | 96.2 | 94.9 |
| 8 Seward | 85.7 | 91.5 | 92.6 |
| 9 York | 94.4 | 94.1 | 93.4 |
| 10 Columbus | 90.1 | 93.7 | 92.7 |
| 11 Norfolk | 85.1 | 90.9 | 93.9 |
| Wayne | 93.8 | | |
| 12 Grand Island | 88.8 | 91.6 | 94.8 |
| 13 Hastings | 82.6 | 82.3 | 91.9 |
| 14 Beatrice | 98.2 | 102.2 | 94.9 |
| Fairbury | 99.9 | | |
| 15 Kearney | 97.5 | 96.4 | 93.2 |
| 16 Lexington | 92.7 | 88.7 | 90.8 |
| 17 Holdrege | 77.6 | 84.1 | 88.1 |
| 18 North Platte | 89.7 | 91.3 | 91.7 |
| 19 Ogallala | 84.0 | 86.0 | 90.5 |
| 20 McCook | 91.3 | 92.3 | 94.8 |
| 21 Sidney | 103.7 | 94.8 | 97.8 |
| Kimball | 78.7 | | |
| 22 Scottsbluff/Gering | 98.7 | 102.3 | 98.3 |
| 23 Alliance | 96.4 | 94.3 | 97.6 |
| Chadron | 84.0 | | |
| 24 O'Neill | 92.8 | 89.5 | 91.2 |
| 25 Hartington | 110.0 | 92.3 | 90.7 |
| 26 Broken Bow | 90.6 | 92.5 | 91.9 |

[1] See region map below.
[2] Sales on which sales taxes are collected by retailers located in the state. Region totals include motor vehicle sales; city totals exclude motor vehicle sales.
Compiled from data provided by Nebraska Department of Revenue.

1985 YEAR TO DATE AS PERCENT OF 1984 YEAR TO DATE IN NEBRASKA'S PLANNING AND DEVELOPMENT REGIONS



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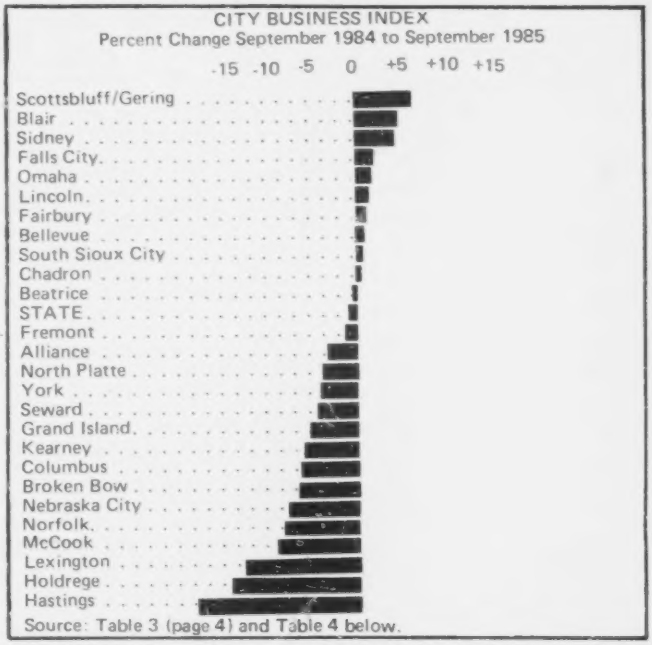
From August to September 1985, the U.S. index of farm prices received was down 0.9 percent; it has dropped 13.1 percent from last September's level.

Compared to September 1984 sales, Nebraska total dollar volume retail sales grew 0.1 percent during September 1985. The increase in total retail sales was due primarily to a 21.7 percent rise in unadjusted motor vehicle sales. Discounts, rebates, and low financing rates offered by automobile dealers prompted consumers to purchase cars and trucks at accelerated rates. When adjusted for price changes, however, total retail sales dropped 1.5 percent in the state during September. Dollar volume nonvehicle sales continued to slide downward in September, falling 2.5 percent. When adjusted for price changes, nonvehicle sales declined 4.1 percent. State retail sales showed continued weakness--only seven cities listed in Table 3 registered sales above September 1984 sales levels.

A sizable decline in September retail sales dropped Chadron to the bottom of the list of cities with positive changes in business activity as measured by the Bureau's city business indicators. Comparing September 1985 economic activity with that of one year ago, ten of the twenty-six cities listed in Table 4 registered positive changes in business activity. Statewide, business activity declined 1.0 percent. Scottsbluff/Gering, bolstered by relatively stable retail sales and an increase in building, led with a 6.5 percent rise in economic activity. Blair's business activity moved upward 4.9 percent, and Sidney's 4.5 percent increase was due to gains in both sales and construction activity. Nebraska's metro areas experienced positive changes in business activity; Omaha scored a 1.9 percent gain, followed by Lincoln with an increase of 1.5 percent.

With the exceptions of short alternating sequences of increases and declines, the Nebraska composite index of leading economic indicators changed little during 1985 (January 1985 at 118.1 and October 1985 at 117.7). The revised September index dropped 0.3 percent after previously being reported flat. The October leading index increased 0.4 percent due to significant gains in the stock price component and the index of prices received by state farmers. Caution should be exercised in interpreting the October increase, since the stock price index is a national index used as a proxy for Nebraska money and credit indicators.

CHARLES L. BARE




Source: Table 3 (page 4) and Table 4 below.

4. September 1985 — CITY BUSINESS INDICATORS

| The State and Its Trading Centers | Percent of Same Month a Year Ago | | |
|---|---|---|---|
| | Employment[1] | Building Activity[2] | Power Consumption[3] |
| *The State* | 99.9 | 111.5 | 99.0 |
| Alliance | 99.0 | 87.0 | 107.3 |
| Beatrice | 99.5 | 136.3 | 91.9 |
| Bellevue | 100.1 | 140.3 | 96.9 |
| Blair | 100.1 | 171.8 | 106.2* |
| Broken Bow | 100.6 | 61.9 | NA |
| Chadron | 96.4 | 758.8 | 89.8 |
| Columbus | 95.8 | 102.5 | 95.5 |
| Fairbury | 100.0 | 147.2 | 116.6 |
| Falls City | 100.7 | 258.5 | 104.2 |
| Fremont | 101.2 | 105.9 | 102.9* |
| Grand Island | 99.7 | 107.8 | 98.1 |
| Hastings | 100.1 | 14.3 | 113.5 |
| Holdrege | 101.3 | 37.4 | 96.5 |
| Kearney | 99.4 | 41.2 | 97.6 |
| Lexington | 98.6 | 17.1 | 102.3 |
| Lincoln | 100.5 | 133.4 | 100.7 |
| McCook | 99.6 | 38.9 | 95.3 |
| Nebraska City | 100.0 | 27.9 | 99.3 |
| Norfolk | 99.8 | 74.4 | 92.8 |
| North Platte | 100.3 | 113.5 | 98.2 |
| Omaha | 100.1 | 124.2 | 96.5 |
| Scottsbluff/Gering | 100.7 | 474.7 | 100.4 |
| Seward | 100.6 | 144.2 | 106.2* |
| Sidney | 99.5 | 221.7 | 99.4 |
| So. Sioux City | 99.1 | 112.1 | 105.6 |
| York | 99.6 | 77.9 | 109.5 |

[1] As a proxy for city employment, total employment for the county in which a city is located is used.

[2] Building Activity is the value of building permits issued as spread over an appropriate time period of construction. The U.S. Department of Commerce Composite Construction Cost Index is used to adjust construction activity for price changes.

[3] Power Consumption is a combined index of consumption of electricity and natural gas except in cases marked * for which only one is used.

Source: Compilation by Bureau of Business Research from reports of private and public agencies.

5. PRICE INDEXES

| September 1985 | Index (1967 = 100) | Percent of Same Month Last Year | Year to Date as Percent of Same Period Last Year* |
|---|---|---|---|
| Consumer Prices | 324.5 | 103.2 | 103.6 |
| Commodity component | 287.1 | 101.7 | 102.1 |
| Wholesale Prices | 305.8 | 98.9 | 99.4 |
| Agricultural Prices | | | |
| United States | 219.0 | 86.9 | 89.5 |
| Nebraska | 210.0 | 85.0 | 89.0 |

*Using arithmetic average of monthly indexes.

Sources: Consumer and Wholesale Prices: U.S. Bureau of Labor Statistics; Agricultural Prices: U.S. Department of Agriculture.

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# NEBRASKA ECONOMIC OUTLOOK 1986

A Preview of Nebraska Farm, Business, and Industrial Conditions for 1986

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A team of specialists from the University of Nebraska-Lincoln will explore the outlook for Nebraska business and agriculture. Donald E. Pursell, Director of the Bureau of Business Research, Thomas S. Zorn, Assistant Professor of Finance, and Bruce B. Johnson, Associate Professor of Agricultural Economics, will present prognostications based on data compiled by the Bureau of Business Research for expected financial conditions for various sectors of the state economy for 1986.

DONALD E. PURSELL is an expert on the Nebraska and the national economy.

In addition to his duties as director of the UN-L Bureau of Business Research and Professor of Business Administration, Pursell also serves as a member of the City of Lincoln's Economic Development Commission and as a economic development consultant to several communities. In the past, he has worked with the National Academy of Science, the Ford Foundation, and the U.S. House of Representatives' Select Committee on Aging.

BRUCE B. JOHNSON is a close observer of financial conditions in the agricultural sector in Nebraska. Chief among his current works is a research study of the economic, social, and psychological impacts of the current farm crisis.

Presently an Associate Professor of Agricultural Economics at the University of Nebraska-Lincoln, Johnson was formerly on the staff of the Economic Research Service division of the U.S. Department of Agriculture. He holds degrees in agriculture and ag economics from Michigan State University and from the University of Nebraska.

THOMAS S. ZORN, Assistant Professor in the UN-L Finance Department, specializes in the study of the impact of information on markets. Banking, the effects of managerial incentives, and the impact of gambling are Zorn's other research interests. He has authored articles in the *Journal of Finance, Economic Inquiry, Quarterly Journal of Business and Economics*, and other business publications.

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